

**PENNSYLVANIA STATE EDUCATION ASSOCIATION**  
**Job Description**

**Job Title:** Payroll/Legal Specialist

**Reports to:** Assistant Executive Director of Administrative Services

**Location:** Harrisburg – PSEA Headquarters

**Starting Salary:** \$73,305.00

**Job Summary**

This paraprofessional position is focused on *payroll processing and legal tracking support work* performed at Headquarters. The position's primary focus is to independently support the Association's payroll and legal tracking systems. Responsibilities are broadly accomplished through the: (1) preparation of the payroll calendar; preparation and distribution of the bi-weekly payroll; performance of all processes and procedures associated with payroll data, calculation and input, tax reporting, file management, records retention; record keeping and payment of employee benefits; and (2) on-going maintenance and related contacts required of the legal tracking management system which includes overseeing the daily operation of the computerized legal tracking system (timely billings and legal expense reimbursements); ensurance of legal tracking system compliance with NEA requirements and associated reporting; control and facilitation of case record management, billings, reimbursements, audit procedures, staff liaison matters; and support of the NEA recurring audit.

Regular contact occurs via telephone, in person, and correspondence inside and outside of the organization with Finance, Human Resources, Legal, and Information Technology staff; banks; retained attorneys; and NEA; by explaining and providing information concerning process and data problems, issues and needs. The employee must have a specialized orientation and understanding of the relevancies of all associated payroll and legal tracking data. Responsible for routines and problem solving for effective data generation and reporting. Work is usually assigned on a recurring process and project basis. Review is conducted through periodic weekly oversight of work in process and final products for adherence to understood work objectives, rules, timelines, and technical and quality standards.

The employee may be requested to serve on various boards and committees within the Association or within the NEA umbrella. The employee may frequently work with confidential and sensitive information. Work is reviewed through reports, staff feedback, and general oversight of performance and results.

## **Job Duties and Responsibilities**

### **Payroll Administration**

1. Administers the payroll program by preparing the payroll calendar, preparing and distributing the bi-weekly payroll, benefit, and garnishment payments via electronic transfer or check and maintaining the payroll tables in the HRIS to ensure the accurate and timely processing of the payroll.
2. Processes monthly, quarterly, and annual tax schedules in accordance with organizational and governmental mandates.
3. Reviews and adheres to strict deadlines related to payroll and tax authorities.
4. Maintains the payroll procedures manual (internal controls) and maintains payroll files in accordance with the record retention policy.
5. Reviews and monitors all applicable payroll tax rates, rules, and regulations to ensure compliance and proper preparation and submission of tax payments, quarterly reports, and payroll deductions. Processes local, state, and federal wage tax payments.
6. Provides information to staff concerning payroll matters.
7. Reviews and assists in the evaluation of employee benefits and employee reimbursements for potential payroll tax implications.
8. Coordinates the transmission of the direct deposit to PNC Bank.
9. Manages the preparation, distribution, billing, collection, and reporting of short and long-term disability, medical, dental, and vision insurance; life insurance; and retiree benefits in cooperation with the Human Resources Division and the Health and Welfare Fund.
10. Leads the incorporating of programming changes and improvements to payroll software, including testing new software and new releases. Acts as the Financial Management liaison regarding the current HRIS vendor for payroll.
11. Coordinates the implementation of 401(k) plan activities and transmits data to provider.
12. Monitors pension, purchase of service, and 401(k) activities for IRS and other governmental compliance.
13. Prepares data reports required periodically and annually for the following employee benefit plans: 401(k), pension, term life, health insurance, dental, vision, AD&D, long-term disability, tuition reimbursement, severance, employee assistance, and benefits administration for part-time employees.
14. Prepares year-end reports for auditors including fiscal, contract, and calendar; and prepares year-end W-2 forms and related reports.

### **Legal Tracking**

1. Supports the administration of the legal tracking management system, which involves working closely with PSEA legal staff, retained attorneys, insurance carriers, and NEA.

2. Oversees the day-to-day operation of the legal tracking system to ensure timely billings to the NEA Dushane Program for reimbursement of legal expenses to PSEA.
3. Trains the staff attorneys and associate staff on the use of the Dushane Legal Management System and answers on-going questions pertaining to its day-to-day use.
4. Assists in processing the accounting in compliance with NEA Legal Services and prepares periodic accounting reports.
5. Establishes and maintains attorneys' cases and billings for NEA Dushane legal cases and the Personal Legal Services Program. Responsible for maintaining accurate records on monies received from members.
6. Reviews and audits incoming bills from staff and retained attorneys to ensure accuracy and conformity with PSEA and NEA requirements. Recommends submission for payment to insurance carriers and reconciles payments to the accounting systems to ensure reimbursement.
7. Reviews, processes, and obtains the PSEA General Counsel's approval for requests for advances for criminal cases (Educators Employment Liability Insurance).
8. Reconciles attorney retainer accounts.
9. Maintains files in accordance with the record retention policy and updates the Legal Tracking Procedures Manual quarterly.
10. Acts as liaison to NEA for the Unified Legal Services program.
11. Serves as the PSEA liaison in enabling the NEA bi-annual audit.
12. Attends legal division staff meetings when legal tracking issues are on the agenda.

#### Financial Management Support

1. Serves as back-up for A/P batch review, approval/posting, and check runs, and provides back-up for A/P data entry when necessary.
2. Prepares the salary and benefit schedules for the annual budget. Prepares mid-year and year-end review analysis of association salary and benefits.
3. Researches and assists with governance/staff inquiries.
4. Establishes and maintains journal entries.
5. Gathers requested data for the annual audit.
6. Serves as back-up for monthly dues pull processing.

#### Other Duties

- Engages in research, analysis, compilation, and reporting of specialized or ongoing requests.
- Works on special project assignments as assigned by divisional or departmental manager.
- Responds to inquiries from other divisions, leaders, members, vendors, consultants, and the public as needed.
- Reviews information in various forms to understand, interpret, explain, and summarize its relevance and impact on divisional functions.

- Handles confidential and sensitive matters on behalf of the divisional or departmental manager, including preparing and communicating on such matters. As such, this position is considered confidential per the PSEA/SO contract.
- Compiles, organizes, and drafts program-related materials for presentations, communications, training sessions, and divisional or departmental meetings.
- Acts as divisional or departmental liaison to other PSEA divisions on payroll related matters.
- Attends meetings on behalf of the division or department as assigned or requested.
- Performs other responsibilities as assigned by the divisional or departmental manager to assure orderly operations.

### **Knowledge, Skills, and Abilities**

- Knowledge of the general principles and practices of effective division-level administrative and operational analyses, generally accepted payroll processing principles, payroll accounting applications, legal accounting, budgeting, record keeping, and tax and financial reporting and analysis.
- Knowledge of standard methods of collecting, evaluating, interpreting, summarizing, and reporting on data relating to divisional programs.
- General knowledge of NEA and PSEA program and business operations and structure that relate to job responsibilities.
- Knowledge of modern office management practices and associated technology.
- Knowledge of general information referencing and accessing methodologies of manuals and program-related documents.
- Knowledge of specialized office procedures and practices, which relate to work processes and program activities.
- Knowledge of electronic data processing methodology and software for the collection and manipulation of data, creation of databases, and report generation.
- Skill in the application of all the required core knowledge.
- Skill in performing computer applications which record, access, and report on divisional information elements and programs.
- Possession of well-developed interpersonal skills.
- Possession of coordinative, analytical, and problem-solving skills that effectively

support division-level operations.

- Skill in organizing and carrying-out staff assignments requiring the packaging and presentation of materials, and development and execution of procedures without direct supervision.
- Ability to read, understand, interpret, and explain provisions that relate to divisional functions.
- Ability to produce exhibits in support of divisional functions.
- Ability to communicate effectively and professionally in a business environment both orally and in writing.
- Ability to establish and maintain effective working relationships with colleagues, managers, employees, members, governance, and the public.
- Ability to apply the essential knowledge requirements in dealing with problems encountered in general division administrative matters.
- Ability to prepare administrative and technical reports.
- Ability to work independently and adapt to shifts in priority requirements while following and conforming to the division calendar.
- Ability to identify information of a confidential or highly sensitive nature and determine how to properly handle such information.
- Ability to adapt to occasional travel and weekend work requirements.
- Stamina to perform job functions and meet deadlines.

### **Education, Experience, and Special Requirements**

An Associate Degree in a relevant field is required with a minimum of three years of progressively responsible payroll experience. A bachelor's degree and/or certificate of payroll credentials would be preferred.

**If you are interested in applying for this position, please send your résumé and cover letter to [jobs@psea.org](mailto:jobs@psea.org) no later than April 22, 2024.**

**EOE**